



AGENCYWIDE SERVICES	CORE	ENHANCED	KEY	PREMIER
DocuSign Platform	×	×	×	×
24/7 Self-Service Portal	×	×	×	×
Mobile App	×	×	×	×
Risk Management & Compliance Portal		×	×	×
Virtual Training Center			×	×
HR Advisory Hotline				×
PROPERTY & CASUALTY SERVICES				
Dedicated Team	×	×	×	×
Certificate Issuance	×	×	×	×
Claims & Audits Support		×	×	×
Experience Modification Analysis & Planning			×	×
Review of Insurance Requirements				×
EMPLOYEE BENEFITS SERVICES				
Consulting & Brokerage Services	×	×	×	×
Employee Benefits Communication Campaigns		×	×	×
Benefits Administration & Enrollment Platforms		×	×	×
EASE Benefits and Employee Insights Report			×	×
Industry Benchmark Reporting			×	×
Health Management Consulting				×
Concierge Enrollment Service				×
Self-Funded Plan Analysis				×

Fusco Orsini
& ASSOCIATES
RISK AND INSURANCE SERVICES

Managing your company's insurance, risk, and compliance needs can be an administrative headache, so we created FO360, streamlined packages to keep your business on track and your mind at ease.

Fusco Orsini & Associates Risk and Insurance Services
National Producer License # 15979499

www.foagency.com

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Email: hello@foagency.com



 **FO360** | CLIENT PACKAGES FOR BUSY PROFESSIONALS

Streamlined insurance, risk, and compliance packages for busy professionals.

Fusco Orsini
& ASSOCIATES
RISK AND INSURANCE SERVICES

PRODUCTS AND SERVICES

Streamlined insurance, risk, and compliance packages for busy professionals.

AGENCYWIDE SERVICES

- **DocuSign Platform**
We execute all contracts and insurance transactions via our DocuSign e-signature platform. Our platform allows our customers to spend less time on insurance and more time focusing on their business.
- **24/7 Self-Service Portal**
The Fusco Orsini & Associates 24/7 self-service portal enables our clients to access all insurance and risk information. Access includes policies, certificates, auto ID cards, compliance tools, etc.
- **Mobile App**
Did you leave work or home without important insurance information? If so, our mobile app will save the day!
- **Risk Management & Compliance Portal**
Our customers love the daily updates they receive from our risk management and compliance portal. This Client Portal delivers thousands of valuable tools to enhance and grow your business.
- **Virtual Training Center**
Our learning center engages your employees with a virtual interactive module that offers over 200 LMS courses.
- **HR Advisory Hotline**
Our clients leverage our live HR advisory hotline to gather second opinions on specific human resource legalities.

PROPERTY & CASUALTY SERVICES

- **Dedicated Team**
With 100 years of combined experience, our property and casualty teams support our clients routinely. Each includes a broker, account manager/executive, and customer service representative. Our teams get to know you and become familiar with your needs.
- **Certificate Issuance**
We know it's essential to issue insurance certificates with speed and accuracy. We also understand that clients need consulting on additional named insured endorsements and insurance requirements. Our emphasis is to issue certificates promptly and provide continuous support to our clients.

- **Claims and Audits Support**
Two significant pain points for the insurance consumer are claims and audits. Our clients appreciate that we eliminate frustration by supporting them in the claims and audits process. Please think of us as your claims and audits liaison.

- **Experience Modification Analysis and Planning**
Workers' compensation insurance is expensive, and experience modification factors (EMOD) could impact costs significantly. Our analysis reports help our clients understand the factors contributing to their EMOD. We also use the information to plan risk management strategies for EMOD reduction and premium savings.

- **Review of Insurance Requirements**
We take the time to review your insurance requirements and advise if you meet them based on your current insurance portfolio. If not, we will provide costs to become compliant and even speak to your client if necessary.

EMPLOYEE BENEFITS SERVICES

- **Consulting and Brokerage Services**
Your broker and account manager team illustrate a cost management strategy and risk management assessment of health and welfare programs.
- **Employee Benefit Communication Campaigns**
Throughout the year and during open enrollment, it's critical to have a clear, concise communication strategy that educates employees on your employee benefits offering. We're here to develop and design branded employee communications plans.
- **Benefits Administration and Enrollment Platforms**
As you grow and scale, leveraging technology to administer and track your Health & Wellness program is vital. We manage your benefits account administration, support your employees, find errors on your bill, and do the upkeep on your platform.
- **EASE Benefits and Employee Insights Report**
This report provides national data, trends, and observations for small-and-medium-sized businesses.
- **Industry Benchmark Reporting**
We provide insight on how your employee benefits offering stacks up with others in your industry by comparing plan design, premium contribution, and medical costs.
- **Health Management Consulting**
We analyze your employee population to gain insight into possible health risks and provide a wellness program that engages all stakeholders by delivering verifiable ROI.
- **Concierge Enrollment Service**
Tracking open enrollment, new hires, and qualifying events can be burdensome. Our concierge enrollment service offers a team of enrollment counselors to guide each employee to elevate their enrollment experience. Multiple languages can be accommodated.
- **Self-Funded Plan Analysis**
The ability to offer your CFO insights on the performance of existing self-funded programs or comparing self-funded plans versus a fully insured model is necessary for proper strategic planning.



ASK ABOUT THESE NON-INSURANCE CONSULTING SERVICES AT PREFERRED PRICING

COBRA Administration

Our preferred vendor partners step in and manage your COBRA administration.

Compliance Documents

We generate compliance notices and disclosures and provide them to you for distribution to your employees. We also provide documentation to comply with any audits you may endure.

Compliance Service Suite (5500 Reporting and ACA Reporting)

Your corporate benefit offering requires many regulatory compliance filings that change. Our partners take the stress off your shoulders by handling these essential filings on your behalf.

Employee Assistance Program (EAP)

We believe your employees' mental health is essential, so we offer a Fusco Orsini & Associates Employee Assistance Plan to help pave the way for a brighter tomorrow.

Document Verification, Compliance, and Tracking Service (i.e., subcontractors, vendors)

Our state-of-the-art tracking software takes the burden of document verification and compliance off your plate.

Executive Benefits

We will refer you to our partner Investment Advisor Representative (IAR) for assistance with building and protecting your wealth and minimizing taxes.

Flexible Spending Account

Flexible Spending Accounts (FSA) are great perks employees can use to save on expenses pre-tax.

HR Advisory Services Including Cloud-Based Company Intranet

With a dedicated HR Account Manager, you're never alone in what can be a confusing and daunting area of your business. You need a trusted source to keep your business and your employees protected. With no limits to the number of calls and emails, the HR Account Manager service offers live support and is your trusted source for information and guidance.

Minimum Essential Coverage Plans

MEC plans meet specific requirements outlined under the Affordable Care Act (ACA) and ERISA but at a fraction of the cost of a traditional health insurance plan.

Nurse Triage Membership

Our nurse triage service partnership allows you to control your workers' compensation losses before submitting a claim to the insurance company. In cases when the nurse recommends treatment, the service will assist you with the claim filing.

On-Demand Risk-Management, Safety and Compliance Pros

We deliver to you a risk and safety workforce reimagined. Consider our on-demand service vendor for safety management, OSHA mock audits, OSHA 10/30 Training, loss control, program development, and more.

Worksite Plans

Also known as supplemental insurance, these plans are a cost-effective solution to help employees offset out-of-pocket medical expenses.

401(K)

Fusco Orsini & Associates developed a Pooled Employer Plan (PEP) and Multiple Employer Plan (MEP) to assist employers with recordkeeping, administration, and cost-savings strategies related to their retired plan offerings.

**Contact Your
Account Manager
for Added
Services**